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ABSTRACT

This self-instructional module, the eighth in a series of 16 on techniques for coordinating work experience programs, deals with developing and implementing training plans. Addressed in the module are the purposes and features of a training plan, developing a training plan, and implementing a training plan for each student in the program. The module contains a series of pretests and learning activities, a guide sheet for a videotape presentation of a teacher-coordinator implementing a training plan with a training sponsor, a posttest, answers to the pretests and posttest, and a list of additional resources. Included in the learning activities are sample training plans for salespersons, dishwasher/waiter's assistants, and janitorial services personnel. Appended to the module are a task analysis procedure and sample task analysis interview and response forms for a salesperson position. (MN)

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The Work Experience Advisory Committee designed the coordination techniques model and developed the module titles and goals. The committee was also extensively involved in editing each module and suggested additions, corrections, and revisions. The Work Experience Advisory Committee included:

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The modules have been field-tested by over 250 teachers in Special Education and over 200 pre-service students in Special Education and Vocational Education.

Production of the modules was coordinated by Ms. Linda Welton. Modules were typed, edited, and assembled by Ms. Linda Welton, Ms. Julie Adams, and Ms. Kris Eichelberger.

WORK EXPERIENCE MODULES

BUSINESS EDUCATION AND ADMINISTRATIVE MANAGEMENT
UNIVERSITY OF NORTHERN IOWA
in cooperation with
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1982

PRE-TEST: GOAL 1

KNOW THE PURPOSES AND FEATURES OF A TRAINING PLAN

DIRECTIONS: If you wish to attempt the module assessment, complete the questions for the pre-test. If you do not wish to take the pre-test, turn to page 3 and begin the learning activities.

1. What is a training plan?

2. Describe the four purposes of a training plan.

3. What major features should be included in a training plan?

DIRECTIONS: When finished with the pre-test, please turn to page 23 and compare your answers with the pre-test key. If you missed any questions, read the material on pages 3-5.

LEARNING ACTIVITIES

GOAL 1: KNOW THE PURPOSES AND FEATURES OF A TRAINING PLAN

INTRODUCTION:

The cooperative work experience program brings together two educational strategies--classroom instruction and on-the-job training. Each by itself is a useful method of developing occupational skills. Combined they offer a more unique and effective education program. In order to be effective, however, the knowledge and experience offered in the classroom must be closely related to those provided on the job. It is the task of the teacher-coordinator to develop those relationships and to insure that the program operates effectively. One of the most important tools available to aid in providing that coordination is the Training Plan.

DEFINITION:

A training plan is a written outline of the knowledges, attitudes, and skills the student should develop during the on-the-job training. The teacher-coordinator develops the training plan by asking the training sponsor which competencies can be developed and measured during the on-the-job training. The training plan is therefore developed through an analysis of the task and duties needed to be successful in the occupation for which the student is training.

PURPOSE:

The general purpose of a training plan is to serve as a guide for the on-the-job training portion of the program. It can be viewed as a "curriculum" to be used by the training sponsor in providing on-the-job training for the student. Specifically, the training plan helps to insure that training is provided in all aspects of a student's job, that everyone understands the training that should be accomplished, and that training is coordinated with the student's classroom experiences.

With a training plan, the training sponsor and the teacher-coordinator can carefully review the student's job and agree upon the training required. The student will be able to see what skills are needed to be successful in the occupation. When all

persons are familiar with the training to be provided, that training should be much more efficient and effective.

A training plan is an important means of reinforcing with the employer that the student's job is a part of a training program. Without a guide for that training it is easy for the job to become routine and the training haphazard.

Finally, the careful development of a training plan will make evaluation of the student's job performance easier. If the knowledges, attitudes, and skills needed in the job are identified and used to train the student, then the student's performance can be evaluated using the same list.

PURPOSES OF THE TRAINING PLAN
PLANNING
(To determine the attitudes and skills to be developed in O.J.T.)
EVALUATION
(To identify student strengths and areas of needed improvement)
COORDINATION
(To insure a relationship between O.J.T. and classroom instruction)
TRAINING
(To provide a guide for the training sponsor to implement training)

FEATURES OF A TRAINING PLAN:

Since a training plan is developed to guide the on-the-job training of the student, the major feature is a listing of the skills to be developed by the student. The skills needed for job success can be broken into five categories:

1. Orientation & Work Adjustment
2. Human Relations
3. Communications
4. Basic Job Skills
5. Specific Job Skills

The specific knowledges, attitudes, and skills should be listed in short, simple statements on the training plan. They can be organized in a variety of ways on the form. They might be grouped according to the five categories listed above, major instructional units used in classroom instruction, sequentially according to the order that training will be provided, or some other method that seems to be appropriate and easily understood.

Administrative information should be included on the training plan such as the student's name and job description, the training sponsor, the employer, etc. In addition, the training plan can be used to indicate when training is to occur, to identify when training has been accomplished, and in some instances, to evaluate the student's performance on the listed skills.

A sample format of a training plan is shown on the next page to illustrate the features described above.

TRAINING PLAN

STUDENT-TRAINEE _____ TRAINING SPONSOR _____

JOB DESCRIPTION _____ TRAINING STATION _____

_____ _____

_____ _____

Initial Training Period

COMPETENCIES TO BE DEVELOPED	EVALUATION
ORIENTATION & WORK ADJUSTMENT	
HUMAN RELATIONS	
COMMUNICATIONS	
BASIC JOB SKILLS	

PRE-TEST: GOAL 2
BE ABLE TO DEVELOP A TRAINING PLAN

DIRECTIONS: If you wish to attempt the module assessment, complete the questions for the pre-test. If you do not wish to take the pre-test, turn to page 7 to begin the learning activities.

1. Identify the 3-step process for developing a training plan.

2. What occupations should be used for developing training plans?

3. What are 3 methods a coordinator could use to identify competencies for a training plan?

DIRECTIONS: When finished with the pre-test, please turn to page 23 and compare your answers with the pre-test key. If you missed any questions, read the material on pages 7-12.

LEARNING ACTIVITIES

GOAL 2: BE ABLE TO DEVELOP A TRAINING PLAN

INTRODUCTION:

A beginning step in using training plans within a work experience program is developing the plan. This may be a difficult task, but certainly not impossible. A great deal of information and help is available to the teacher-coordinator who wants to develop a good set of training plans.

The development process includes three major steps:

1. Determine the occupations for which plans must be developed.
2. Identify the knowledges, attitudes, and skills necessary for success in each occupation.
3. Develop an appropriate training plan format.

STEP 1: SELECTING OCCUPATIONS:

A training plan must be used for each student and should be based on the student's career objective. The training plan might be developed for broad, generic occupations (salesperson) or for specialized job titles (supermarket cashier/checker). If the generic job grouping is used to develop training plans, care must be taken so that specialized skills or knowledges needed for particular types of businesses are not ignored.

Developing training plans for specialized job titles can be extremely time-consuming. Here the teacher-coordinator must be careful or the training plan may be so specialized that the student will be unable to make successful job shifts.

The teacher-coordinator should study the reliability of student's career choices, the general or specialized nature of the vocational program, and the level of training being provided when determining the job titles to use in developing training plans.

STEP 2: COMPETENCY IDENTIFICATION:

The most important part of the training plan is a description of the training that is to be provided on the job. This description should consist of the knowledges, attitudes, and skills (competencies) that the student must develop in order to be an effective employee.

There are several methods a teacher-coordinator can use to develop competency lists for specific job titles. First, you should determine if training plans are already available for the identified occupations. Copies of training plans may be available from the state department of education, vocational education departments at universities, and from vocational teacher associations. Other coordinators that have developed training plans may be willing to share copies. Sample training plans can frequently be found by reviewing books and journals as well as curriculum units and instructional materials.

As with all materials located in this manner, the teacher-coordinator should review the training plan carefully to make sure they are accurate and useful. The materials can be checked by training sponsors and advisory committee members for accuracy, and modified by the teacher-coordinator to fit the needs within the program.

Much research has been completed in recent years to identify the competencies needed by employees in specific occupations. These studies provide one of the best sources for teacher-coordinators to use in developing training plans. The teacher-coordinator should review task analysis studies and competency-identification research to identify those studies that related to the identified occupations of students within the program. When appropriate studies are found, they can be used to develop new training plans or check the validity of currently used plans. If a training plan format has been developed, the identified competencies can be used to complete the training plan.

If such studies are not available, the teacher-coordinator can develop competency lists by having advisory committee members, training sponsors, and other business people complete task inventories. In this process, a set of task statements for an occupation is presented to a sample of business people who are familiar with the occupation being studied. They then identify those tasks that are important to job success. The identified competencies can be used to prepare a training plan for the occupation. (The task inventory process is described in more detail in Appendix 1 of this module.)

STEP 3: TRAINING PLAN FORMAT

While there is no single format that is best for a training plan, the format developed should make the plan as easy to use as possible. Remember that you will not be the only person using the training plan--the training sponsor and student will be using it on a regular basis. Develop a format that is easy to understand and use.

The format should include necessary administrative information and the competencies identified for the occupation. The competencies should be organized to aid the training sponsor in planning the training. Training plans may also be used to evaluate the student's performance throughout the school year. In that situation an evaluation scale should be developed for each of the competencies on the training plan. An open-ended evaluation section may be included to identify the student's strengths and areas of needed improvement.

Sample training plans are shown on pages 9-14 that illustrate several appropriate formats.

SALES TRAINING PLAN

STUDENT-TRAINEE _____ TRAINING SPONSOR _____

JOB DESCRIPTION _____ TRAINING STATION _____

Initial Training Period

COMPETENCIES TO BE DEVELOPED	EVALUATION		
HUMAN RELATIONS SKILLS			
____ Demonstrates a positive attitude toward the store, its merchandise, and services.	Excellent attitude	OK	Needs Improvement
____ Works cooperatively with customers, co-workers, and managers.	Needs Improvement	OK	Works cooperatively
____ Serves the customer courteously.	Courteously serves customer	Needs Improvement	OK
____ Demonstrates a concern for the feelings and rights of each individual.	OK	Shows concern for people	Needs Improvement
____ Accepts criticism and uses it to improve performance.	Accepts criticism well	OK	Needs Improvement
BASIC JOB SKILLS			
____ Follows the store's policies, rules, and regulations.	Follows rules well	OK	Needs Improvement
____ Learned the responsibilities of the sales position.	Learned responsibilities	OK	Needs Improvement
____ Developed effective work habits such as punctuality, dependability, and initiative.	Needs Improvement	Excellent work habits	OK
____ Dresses in an appropriate manner for the job.	OK	Well dressed	Needs Improvement
____ Practices good personal hygiene.	Good hygiene	OK	Needs Improvement
____ Listens to and follows directions, assignments, and information from customers and managers.	Completed assignments well	OK	Needs Improvement
____ Effectively communicates with customers, employees, and managers.	Needs Improvement	Communicates well	OK
____ Uses telephone correctly.	OK	Uses correctly	Needs Improvement
____ Demonstrates the ability to perform needed mathematical computations.	Performs well	OK	Needs Improvement
____ Demonstrates the ability to effectively use a cash register and make change.	Uses cash register well	Needs Improvement	OK
____ Demonstrates the ability to handle all types of sales transactions such as layaway, exchange, or refunds.	Handles well	OK	Needs Improvement
____ Performs tasks in addition to the sales functions such as housekeeping, stockkeeping, etc.	Performs duties well	Needs Improvement	OK
____ Aware of where merchandise is located.	Knows location	OK	Needs Improvement
____ The ability to receive, check, and mark merchandise.	OK	Needs Improvement	Performs Skills well
____ Studies merchandise information found on tags, labels, leaflets, etc.	Studies information	OK	Needs Improvement
____ Ability to stock shelves, racks, and displays.	OK	Excellent ability	Needs Improvement
____ Demonstrates effective use of time.	Good use of time	OK	Needs Improvement

SALES TRAINING PLAN

COMPETENCIES TO BE DEVELOPED	EVALUATION		
SALES ATTITUDES			
____Displays the attitude of giving the customer the best service and treatment possible.	Displays excellent service attitude	OK	Needs Improvement
____Show a sincere interest in customers and their problems.	Needs Improvement	Sincere interest shown	OK
____Tries to sell the customer on merchandise benefits; not on the merchandise itself.	OK	Sells merchandise benefits	Needs Improvement
SALES SKILLS			
____Use an appropriate customer approach.	Uses appropriate approach	OK	Needs Improvement
____Asks questions to determine customer needs and buying motives.	OK	Needs Improvement	Good use of questions
____Listens to and analyzes customer reactions in order to develop the sales presentation to meet the needs of the customer.	Needs Improvement	OK	Analyzes well
____Provides merchandise information and how the product is used.	Provides information	OK	Needs Improvement
____Demonstrates the merchandise and involves the customer to create interest and desire.	OK	Demonstrates well	Needs Improvement
____Uses trial closing techniques at the appropriate time.	Needs Improvement	Uses trial closing well	OK
____Informs the customer of services provided by the store.	Informs well	OK	Needs Improvement
____Uses effective suggestion selling techniques.	Suggestion selling effective	OK	Needs Improvement
____Reassures customer that purchase was a wise buying decision.	Reassures well	Needs Improvement	OK

DIRECTIONS: Please give the training period just completed careful consideration. If a student is to improve the on-the-job performance, he/she must understand both their strengths and areas of needed improvement. Please list these in the appropriate column.

STRENGTHS	AREAS OF NEEDED IMPROVEMENT

STUDENT-TRAINEE _____

TRAINING SPONSOR _____

TRAINING STATION _____

_____

JOB DESCRIPTION _____

_____

Initial Training Period

COMPETENCIES TO BE DEVELOPED	EVALUATION		
HUMAN RELATIONS SKILLS			
_____ Works cooperatively with customers, co-workers, and managers.	Works Well	OK	Needs Improvement
_____ Has a positive attitude toward the restaurant, its food and services.	Needs Improvement	Positive Attitude	OK
_____ Shows initiative and enthusiasm for the job.	OK	Needs Improvement	Shows Enthusiasm
_____ Accepts criticism and uses it to improve performance.	Accepts Well	OK	Needs Improvement
_____ Represents the restaurant favorably to customers.	Needs Improvement	Represents Well	OK
_____ Maintains self-control during trying situations.	OK	Needs Improvement	Excellent Control
_____ Demonstrates the ability to work with difficult customers.	Demonstrates Well	OK	Needs Improvement
COMMUNICATIONS			
_____ Listens carefully and communicates effectively with customers.	Needs Improvement	Very Effective	OK
_____ Listens to and follows directions.	OK	Needs Improvement	Excellent Ability
_____ Interprets restaurant policies correctly to the customers.	Interprets Correctly	OK	Needs Improvement
_____ Satisfactorily handles customer's inquiries and complaints.	Needs Improvement	Handles Well	OK
BASIC JOB SKILLS			
_____ Understands and follows restaurant's rules and regulations.	OK	Needs Improvement	Follows Well
_____ Demonstrates effective and appropriate grooming and personal hygiene.	Excellent Grooming	OK	Needs Improvement
_____ Replaces soiled linen with clean linen and napkins.	Needs Improvement	Always Replaces	OK
_____ Replenishes butter supply and refills water glasses for customers.	OK	Needs Improvement	Performs Well
_____ Replenishes service bar with sauces, coffee, soups, etc.	Handles Well	OK	Needs Improvement
_____ Brings clean silverware, china, and glasses to dining room.	Needs Improvement	Excellent Ability	OK

COMPETENCIES TO BE DEVELOPED	EVALUATION		
_____ Removes dirty dishes from tables and return to kitchen area.	OK	Completes Well	Needs Improvement
_____ Performs dining room duties without disrupting service or customers.	Performs Well	OK	Needs Improvement
_____ Reports short supply of food and non-food items.	Needs Improvement	Always Reports	OK
_____ Demonstrates ability to run dishwasher/ kitchen equipment properly.	OK	Needs Improvement	Runs Well
_____ Follows correct procedures for cleaning, stacking, and washing dishes.	Correct Procedures	OK	Needs Improvement
_____ Washes and wipes dishes properly.	Needs Improvement	Handles Well	OK
_____ Stores dishes and utensils properly after washing.	OK	Needs Improvement	Stores Properly
_____ Sweeps and cleans dining area.	Excellent	OK	Needs Improvement
_____ Dusts furniture and fixtures.	Needs Improvement	Dusts Well	OK
_____ Effectively cleans shelves and equipment of service bar, coffee urn, cream dispenser, etc.	OK	Needs Improvement	Cleans Effectively
_____ Keeps food and supplies in stockroom organized and accessible.	Well Organized	OK	Needs Improvement
_____ Keeps restrooms well supplied with soaps, towels, etc. and clean.	Needs Improvement	Excellent	OK
_____ Checks all items for stains before using.	OK	Needs Improvement	Checks all items
SELLING AND SERVICE			
_____ Demonstrates ability to adjust customer's complaints concerning food and service.	Excellent Ability	OK	Needs Improvement
_____ Demonstrates ability to receive "take out" orders by phone and package these orders to go.	Needs Improvement	Handles Well	OK
_____ Demonstrates ability to make suggestions to customers for special dishes, beverages, items on the menu.	OK	Needs Improvement	Effective Suggestions
_____ Demonstrates ability to suggest to customers good motels, hotels, points of interest, or entertainment.	Very Knowledgeable	OK	Needs Improvement
_____ Demonstrates ability to give customers directions.	Needs Improvement	Excellent Directions	OK
_____ Demonstrates ability to take reservations.	OK	Needs Improvement	Excellent Ability
_____ Assists waiters/waitresses in their duties as needed.	Assists Well	OK	Needs Improvement

DIRECTIONS: Please give the training period just completed careful consideration. If a student is to improve on-the-job performance, he/she must understand both their strengths and areas of needed improvement. Please list these in the appropriate column.

STRENGTHS	AREAS OF NEEDED IMPROVEMENT

JANITORIAL SERVICES TRAINING PLAN

STUDENT-TRAINEE _____

TRAINING SPONSOR _____

JOB DESCRIPTION _____

_____

TRAINING STATION _____

_____

Initial Training Period

COMPETENCIES TO BE DEVELOPED	EVALUATION		
HUMAN RELATIONS/COMMUNICATION SKILLS			
___Displays cooperative attitude toward supervisor and other employees.	OK	Cooperatives Well	Needs Improvement
___Displays courtesy to personnel/ customers/clients.	Is Courteous	OK	Needs Improvement
___Listens to and follows directions.	Needs Improvement	OK	Excellent Ability
___Shows a genuine interest in developing job skills.	Shows Interest	OK	Needs Improvement
___Know how and when to speak to personnel/customers/ clients.	OK	Needs Improvement	Communicates Effectively
___Demonstrates a positive attitude toward the business.	Good Attitude	Needs Improvement	OK
___Ability to do work without being told.	OK	Needs Improvement	Works Alone
___Ability to take constructive criticism.	Accepts Well	OK	Needs Improvement
___Ability to admit mistakes and learn from them.	Needs Improvemen.	OK	Admits Mistakes
___Maintains self control during trying situations.	Maintains Control	Needs Improvement	OK
BASIC JOB SKILLS			
___Ability to be to work on time.	On Time	OK	Needs Improvement
___Demonstrates respect for property.	OK	Needs Improvement	Shows Respect
___Follows rules and regulations of job.	OK	Needs Improvement	Follows Rules
___Dresses cleanly and appropriately for work.	Needs Improvement	OK	Dresses Appropriately
___Is prompt in returning from break.	OK	Needs Improvement	Is Prompt
___Organizes supplies area.	Organizes Well	OK	Needs Improvement
___Spot cleans using cleaner and cleaning cloth.	Needs Improvement	OK	Can spot Clean
___Empties and cleans cigarette urns.	Cleans Urn	Needs Improvement	OK
___Dusts fixtures and changes light bulbs.	Dusts Fixtures	Needs Improvement	OK
___Dry mops floors.	Needs Improvement	OK	Dry mops Well
___Wet mops floors.	Wet mops Well	OK	Needs Improvement
___Uses a broom and dust pan correctly.	OK	Needs Improvement	Uses Broom, Dustpan Well
___Uses an electric vacuum on the floor.	Needs Improvement	OK	Vacuums Floor Correctly
___Contacts supervisor when problems arise.	OK	Needs Improvement	Contacts Supervisor
___Identifies problems with equipment.	Identifies All Problems	OK	Needs Improvement
___Contacts appropriate person when supplies are low.	OK	Needs Improvement	Contacts When Necessary

COMPETENCIES TO BE DEVELOPED	EVALUATION		
ADVANCED JOB SKILLS			
___Ability to use job site's intercom or telephone correctly.	Needs Improvement	OK	Excellent Ability
___Takes down and cleans light fixtures.	Cleans Light Fixtures	OK	Needs Improvement
___Washes inside and outside windows.	OK	Needs Improvemem	Can Wash Windows
___Checks that all supplies are on hand before cleaning.	Needs Improvement	OK	Checks Supplies
___Fills toilet tissue and towel dispensers.	OK	Needs Improvement	Fills Dispensers
___Fills soap jar or stocks soap bars.	Fills and Stocks Well	OK	Needs Improvement
___Cleans mirrors.	Needs Improvement	OK	Cleans Mirrors Well
___Cleans all bathroom fixtures.	OK	Needs Improvement	Cleans Fixtures
___Dusts, polishes, or cleans with appropriate materials.	Excellent	OK	Needs Improvement
___Cleans and vacuums furniture.	Needs Improvement	OK	Cleans Furniture
___Strips and waxes floors.	Strips and Waxes	Needs Improvement	OK
___Buffs floors and shampoos carpets.	OK	Needs Improvement	Buffs and Shampoos
___Cleans ceramic tile.	Needs Improvement	OK	Cleans Tile
SAFETY PROCEDURES			
___Ability to follow policies in locking windows and doors.	Locks Windows and Doors	OK	Needs Improvement
___Ability to use fire extinguisher.	OK	Needs Improvement	Uses Fire Extinguisher
___Ability to replace batteries in fire alarm.	Needs Improvement	OK	Can Replace Batteries
___Uses all equipment carefully and safely.	Needs Improvement	OK	Correct Use Of Equipment
___Posts safety signs when mopping and waxing.	Posts Signs	OK	Needs Improvement
___Understands accident procedures.	OK	Needs Improvement	Understands Procedures
___Reports accidents and safety problems immediately to supervisor.	Reports Problems	OK	Needs Improvement

DIRECTIONS: Please give the training period just completed careful consideration. If a student is to improve the on-the-job performance, he/she must understand both their strengths and areas of needed improvement. Please list these in the appropriate column.

STRENGTHS	AREAS OF NEEDED IMPROVEMENT

PRE-TEST: GOAL 3

BE ABLE TO IMPLEMENT A TRAINING PLAN FOR EACH STUDENT IN YOUR PROGRAM

DIRECTIONS: If you wish to attempt the module assessment, complete the question for the pre-test. If you do not wish to take the pre-test, turn to page 16 to begin the learning activities.

1. Outline a meeting between a teacher-coordinator and a training sponsor to implement a training plan.

DIRECTIONS: When finished with the pre-test, please turn to page 24 and compare your answer with the pre-test key. If you missed the question, read the material on pages 16-20.

LEARNING ACTIVITIES

GOAL 3: BE ABLE TO IMPLEMENT A TRAINING PLAN FOR EACH STUDENT IN YOUR PROGRAM

INTRODUCTION:

At the beginning of the school year, the teacher-coordinator works closely with each training sponsor to begin the training program. Students are beginning their jobs with the employers, training agreements are signed, and the teacher-coordinator explains the responsibilities of the training sponsor to each person. This is the time the training plan should be developed and implemented.

MEETING WITH THE TRAINING SPONSOR:

The teacher-coordinator's first contact with an employer is a meeting to secure a training station for a vocational education student. This meeting usually occurs in the spring, and provides the teacher-coordinator with the opportunity to introduce the program to the business person.

As soon as possible after the student is placed, the teacher-coordinator should meet for a second time with the training sponsor. This meeting is primarily informational. The purposes and features of the vocational program should be reviewed as well as the role and responsibilities of the training sponsor. The training agreement should be reviewed and signed. The concept and purpose of the training plan should be explained. All questions and concerns of the training sponsor should be carefully answered.

This meeting will be very important and may be quite time consuming--particularly with those training sponsors who have not previously worked with the program. The teacher-coordinator may not wish to spend additional time in developing and explaining a specific training plan at this meeting. A useful alternative is to give the training sponsor a short orientation training plan that will guide the student's training during the first one or two weeks of employment. This plan will be very basic and similar for all students in the program. Using the orientation plan will allow the training sponsor to become familiar with the use of the form. It will also give the coordinator additional time at the beginning of the school year to work with new training sponsors on developing and implementing a specific training plan. A sample orientation training plan is shown on pages 17 and 18.

ORIENTATION TRAINING FOR SALESPERSON

DIRECTIONS: A good orientation is important for all new employees. This may be the new employee's first job and he/she may be uneasy about asking questions. The orientation training plan provides you with an opportunity to develop a spirit of cooperation and effective communication between each new employee and yourself. The activities listed in the outline are suggested items to explain during the orientation training period. You may wish to modify the form for use in your business. Check each item as it is explained to the new employee.

ORIENTATION TO THE BUSINESS

____Provide printed materials about the company.
____Provide background information on the business.
____Explain the business' philosophy toward customers.
____Explain the business' expectations of new employees.
____Provide an overview of the selling job.
____Have the new employee complete necessary forms and paper work.
____Answer any questions from the new employee.

BUSINESS PROCEDURES AND REGULATIONS

Explain to the new employee:

____Work schedules
____How to check in and out
____Pay rate (regular/overtime); when and how student is paid
____All applicable fringe benefits
____Appropriate dress and grooming
____Schedule and location for meals and breaks
____Procedures for absences, tardies, and time off
____Safety procedures and how to handle accidents
____Dealing with job questions and problems
____Telephone use
____Probationary period and reasons for termination
____Evaluation procedures

ORIENTATION TO THE JOB

____Introduce the person to whom the student will be responsible
____Explain the supervisor's role
____Tour the work area
____Introduce the student to co-workers
____Explain the duties of the job
____Review any training materials and procedures available for the student to use

ORIENTATION TO BASIC SELLING SKILLS

Demonstrate how to perform the following skills:

_____Operate the cash register
_____Make change
_____Handle cash/charge sales
_____Handle credit card sales
_____Check cashing procedures
_____Cash returns/credits
_____Complete the sales ticket
_____Housekeeping duties
_____Answer telephone
_____Communication with customers
_____Handle customer complaints
_____Sales do's and don'ts
_____Approach the customer
_____Use product knowledge
_____Handle objections
_____Close the sale

OTHE PROCEDURES OR INFORMATION

Please list:

IMPLEMENTING THE TRAINING PLAN:

The next meeting between the teacher-coordinator and the training sponsor is used to implement the training plan. The training sponsor must recognize the importance of his/her training role if the vocational program is to be successful. It is the responsibility of the training sponsor to begin the on-the-job training process.

There are two goals to be accomplished when the teacher-coordinator meets with the training sponsor to implement the training plan:

1. To explain the parts of the training plan

2. To develop procedures for the training sponsor to follow so that the training plan is effectively used.

PARTS OF THE TRAINING PLAN:

The training sponsor needs to be very familiar with the training plan format. Review each part to show the training sponsor how it will be used.

Three parts merit special concern. First the job description must clearly state the major responsibilities of the student. Second, the subject matter section must include all of the knowledges, attitudes, and skills the student will develop on-the-job. The competency statements must be sequenced in a way that is understandable to the training sponsor and the student and need to be related to the student's in-class instruction. Third, the evaluation section should allow each competency to be rated easily and objectively.

PROCEDURES FOR USING THE TRAINING PLAN:

Procedures should be developed so the training plan can be used immediately. The training sponsor and student will need to discuss the training plan during the first few weeks. During the discussion, they should review:

1. The purpose of the training plan
2. The list of knowledges, attitudes, and skills
3. When the student will be evaluated
4. Procedures for evaluation

After reviewing the training plan and procedures, the training sponsor and the student should identify the initial areas for training. Training should begin with an orientation to the job and the basic skills the student will need to use during the first few weeks. Then additional competencies can be identified as the student progresses.

To help the training sponsor implement the training plan, the teacher-coordinator needs to visit the training station regularly. Evaluation conferences should be scheduled regularly to carefully review the training. In addition, coordination

visits can be made to observe the student and to discuss the training with the student and the training sponsor. A formal performance appraisal interview involving the student, training sponsor, and teacher-coordinator should be conducted at least once every five to nine weeks.

VIDEO-TAPE:

You should now watch the video-tape of a meeting between a teacher-coordinator and a training sponsor. The meeting is the third/fourth in a sequence of coordination calls and its purpose is to implement the training plan. Please use the guide sheet on page 21 for taking notes on the meeting. Refer to the training plan on page 11 while viewing the video-tape.

A GUIDESHEET FOR THE VIDEO-TAPE ON IMPLEMENTING A TRAINING PLAN

DIRECTIONS. Please use this sheet to take notes while viewing the video-tape for this module. Also refer to the Training Plan shown on pages 11-12 of this module.

1. What is the purpose of the training plan?

2. What were the major parts of the training plan identified for the training sponsor?

3. What procedures were suggested to the training sponsor for using the training plan?

DIRECTIONS: When you have finished watching the video-tape, please complete the post-test on page 22. If you need additional information before attempting the post-test, turn to the Resources on page 26.

POST TEST

1. Identify an occupation of one of the students in your work experience program.

2. Develop a training plan based on the occupation identified above.

PRE-TEST KEY

GOAL 1

1. What is a training plan?

   A training plan is a written outline of knowledges, attitudes, and skills the student should develop through on-the-job training. The plan is developed through an analysis of the tasks and duties needed to be successful in the occupation for which the student is training.

2. Describe the four purposes of a training plan.

   Planning--to identify the content for on-the-job instruction
   Coordination--to show relationships between classroom instruction and on-the-job training
   Training--to assist the training sponsor in organizing learning experiences
   Evaluation--to identify the student's strengths and areas of needed improvement

3. What major features should be included in a training plan?

   Competencies--an organized list of the knowledges, attitudes, and skills the student must learn on the job.
   Evaluation section to evaluate the student's job performance
   Administrative information including a detailed description of the student's job

GOAL 2

1. Identify the three step process for developing a training plan.

   A. Determine the occupations for which plans must be developed.
   B. Identify the knowledges, attitudes, and skills necessary for success in each occupation.
   C. Develop an appropriate training plan format.

2. What occupations should be used for developing training plans?

   A training plan should be developed for each student in the vocational program. The training plan should be based on the student's career objectives. Occupations selected can either be based on broad, generic job titles or very specialized titles based on student's needs and the goals of the program.

3. What are 3 methods a coordinator could use to identify competencies for a training plan?

   A. Locate training plans that have already been developed by other teachers or university and state department of education personnel.
   B. Identify research studies that have specified the competencies needed by employees in particular occupations.
   C. Have business people complete task inventories.

GOAL 3

1. Outline a meeting between a teacher-coordinator and a training sponsor to implement a training plan.

   A. Review the features and purposes of a training plan.
   B. Review the responsibilities of the training sponsor and teacher-coordinator in implementing the training plan.
   C. Explain each of the parts of the training plan including the competency list and evaluation section.
   D. Develop procedures for the training sponsor and student to follow in using the training plan.
   E. Answer all of the training sponsor's questions.
   F. Identify when coordination calls and evaluation conferences will be scheduled.

DIRECTIONS: If you missed any of the pre-test items, please turn to the appropriate Learning Activities. If you would like more depth in the areas covered, turn to the Resourceson page 26.

POST TEST KEY

DIRECTIONS: Evaluate the training plan you have developed using the following criteria.

	YES	NO
1. Is the training plan based on a student's career objective?	___	___
2. Have the competencies been evaluated by business people to determine their validity?	___	___
3. Are competencies identified for each of the following categories:		
A. Orientation and work adjustment?	___	___
B. Human Relations?	___	___
C. Communications?	___	___
D. Basic Job Skills?	___	___
E. Specific Job Skills?	___	___
4. Are competencies stated in understandable language?	___	___
5. Is the form organized so it is easy to use?	___	___
6. Can the training plan be used to evaluate each competency?	___	___
7. Is the necessary administrative information and appropriate directions included in the training plan?	___	___

ADDITIONAL RESOURCES

1. Meyer, Warren G., Crawford, Lucy C., and Klaurens, Mary K., Coordination in Cooperative Vocational Education. Charles E. Merrill Publishing Company, Columbus, Ohio, 1975.

2. Module J-5: Place Co-op Students on the Job, American Association for Vocational Instructional Materials, Athens, Georgia. 1978.

TASK ANALYSIS PROCEDURE

INTRODUCTION

A task analysis procedure is designed to collect information about the knowledges, attitudes, and skills necessary to be successful in a specific occupation. Information is gathered from people who have expert knowledge about the occupation--people who have worked in the occupation for several years and managers or supervisors who are familiar with the occupation.

A teacher-coordinator of a vocational education program needs to have a detailed description of job duties and tasks in order to plan instruction for students who are training in particular occupations. The detailed task list is given to the training sponsor and he/she is asked to identify the tasks which are needed by the student for job success. The competencies needed for success in an occupation are used to outline the training to be provided for a student. Using a task analysis to develop a training plan helps to insure that the student is receiving appropriate training for the job.

COMPLETING A TASK ANALYSIS

Three steps are involved in completing a task analysis. First, a questionnaire must be developped. The questionnaire contains a comprehensive list of possible tasks for an occupation that can be evaluated by business people. The list can be developed in several ways. Tasks can be written by reviewing textbooks and training materials for the occupation. Research studies may be available that describe the tasks. Or advisory committee members, training sponsors, or advanced students can be asked to list the tasks needed for an occupation. This original list need not be correct since it will be evaluated by experts in the occupation. However, attempts should be made to list all possible tasks.

When the tasks have been identified, rating scales should be developed for the questionnaire. The scales are needed so that business people can rate each task statement. A variety of information about each task could be collected through the use of rating scales. Two such scales are shown on the sample questionnaire on page Appendix 6--importance of the task, and training sequence.

The second step in the task analysis procedure is to conduct interviews with experts in the occupation being studied. Persons interviewed should have at least 2-3 years of experience with the occupation so they will be able to accurately describe the job duties.

A number of business people should be interviewed for each occupation. Different types and sizes of businesses should be used to get a broad picture of the occupations as well as to note any differences that exist among businesses.

The business people should be interviewed in person. A typical interview will last approximately 30-45 minutes. An interview procedure is shown on pages Appendix 3,4. If the procedure is carefully specified, other people can actually conduct the interviews.

The first part of the interview asks the businessperson to identify the major tasks and responsibilities of an employee in the occupation being studied. Open ended questions are used and all ideas are recorded. This information is used to check the completeness of the Task Inventory Form. Seven to ten minutes should be spent on the first part of the interview (Refer to page Appendix 5 for an example of the response form.)

During the second part of the interview the businessperson uses the Task Inventory Form to identify specific tasks completed by employees in the occupation. The businessperson rates each task statement using the criteria shown on the form. Refer to Appendix 7 - 13 for a Task Inventory Form for the occupation of Salesperson.

The final step in the task analysis procedure is to summarize the data collected during the interviews. A final list of tasks can be developed from those that most business people ranked as important or very important. The tasks can be sequenced as entry level, intermediate, or advanced tasks.

From this information, training plans can be developed, instructional materials can be selected or prepared, and students can determine what knowledges, attitudes, and skills are needed for success in the occupation.

Task analysis procedures are used when adequate information is not available to plan instruction for a particular occupation. The teacher-coordinator should look to see if such information is already available before completing a task analysis.

TASK ANALYSIS INTERVIEW PROCEDURE

STEP 1: INTRODUCE YOURSELF AND THANK THE BUSINESSPERSON FOR TAKING TIME TO ASSIST IN THE PROJECT.

STEP 2: EXPLAIN THE PURPOSE OF THE VISIT:

1. To get their opinion of what knowledges, attitudes, and skills are needed to be a successful salesperson.
2. Explain that we are interviewing approximately 50 successful business people to find out what skills are needed to be a successful salesperson. All the information from the interview will be tabulated to develop:
   a. A list which identifies the important skills needed by a salesperson.
   b. An instrument which may be used to train new employees. "We will be very happy to provide you with the training plan when we have completed our project."
3. Our interview today should last between 30-45 minutes and it will be divided into two parts:

   Part 1: We would like to visit with you for about 7-9 minutes about what attitudes and skills you want your salesperson to possess. (This part of the interview is open-ended; your goal is to determine what the businessperson feels are the most important skills needed by a salesperson.) It is important that you ask each businessperson the following 7 questions AND record their answers on the answer form entitled RESPONSE FORM FOR PART 1: QUESTIONS OF THE TASK ANALYSIS FOR THE JOB OF salesperson. (Keep this part of the interview brief--lead the businessperson through the interview by going to the next question after each response.)

QUESTIONS TO ASK DURING THE INTERVIEW TO GET THEIR OPINION

1. What human relations skills do you want your salesperson to practice?
2. What do you want your salesperson to know about the products they sell?
3. What basic job skills do you want your salesperson to practice? (Definition of basic job skill: Those skills needed by your sales employees which are very minimal to keep their job.)
4. What communications skills do you want your salesperson to practice?
5. What selling skills do you want your salesperson to practice?
6. What merchandising skills do you want your salesperson to practice? (Definition of merchandising: Those skills in area of buying, pricing, marking and stocking.)
7. What display skills do you want your salesperson to practice?

   Part II: The second part of our visit with you involves completing the task inventory form to identify the skills needed to become a successful salesperson. (Hand the task inventory form to the businessperson to complete the top section pertaining to background information. Then explain to the businessperson how to complete each item on the form.)

We are interested in learning your opinion about what skills are needed by a salesperson. More specifically, we are going to ask you two questions about each skill on our task inventory form:

1. How IMPORTANT is each skill? (Column 1 - IMPORTANCE)
2. When should the skill be developed? (Column 4 - TRAINING SEQUENCE)

Define the terms for the businessperson for the second question: "When should the skill be developed?"

Entry level means that the employee should have the skill developed during the first or second week on the job.

Intermediate level means that the employee should develop the skill within the first 60-90 days on the job.

Advanced level means that the skill is more difficult and will take more time than the first 90 days to develop.

Make sure before you leave that the businessperson has responded to each item AND has completed the information at the top of the first page of the task inventory concerning the store and business experience.

STAPLE THE TASK INVENTORY FORM AND RESPONSE FORM FOR PART 1 QUESTIONS OF THE TASK ANALYSIS TOGETHER.

NOTE THE FOLLOWING INFORMATION SO WE MAY WRITE A THANK YOU LETTER TO EACH BUSINESSPERSON WHO COMPLETED A TASK ANALYSIS INTERVIEW.

Name & Title _____

Business Address _____

City & Zip Code _____

PART I: RESPONSE FORM

Name - Title _____
Business _____
Address _____
City - Zip Code _____

1. What human relations skills do you want your _____ to practice?

2. What product information do you want your _____ to know about the products they sell?

3. What basic job skills do you want your _____ to practice?
(Definition of basic job skill: Those skills needed by your employers which are very minimal to keep their job.)

4. What communication skills do you want your _____ to practice?

5. What selling skills do you want your _____ to practice?

6. What merchandising skills do you want your _____ to perform?

7. What display skills do you want your _____ to perform?

SALESPERSON

_____Years of experience as a salesperson.
_____Number of employees in the store.
Type of store: (check one)
_____Men's Apparel
_____Women's Apparel
_____Department Store:
_____Men's Apparel
_____Women's Apparel
_____Hard Goods Dept.
_____Soft Goods Dept.
_____Shoe Store
_____Appliance Store
_____Hardware Store
_____Variety Store
_____Furniture Store
_____Jewelry Store
_____Specialty Store (Please list)
_____Others (Please list)

	IMPORTANCE						TRAINING SEQUENCE			
	Very Important	Important	Undecided	Somewhat Important	Not Important		Entry Level	Intermediate Level	Advanced	
HUMAN RELATIONS										
1. Demonstrates a positive attitude toward the store, its merchandise, and services.										
2. Demonstrates good work habits such as punctuality, dependability and initiative.										
3. Works cooperatively with co-workers and managers.										
4. Serves the customer courteously.										
5. Demonstrates a concern for the feelings and rights of each individual.										
6. Demonstrates skills in adapting to work with different types of personalities.										
7. Demonstrates the ability to work with difficult customers.										
8. Maintains self-control during trying situations.										
9. Ability to treat nonbuying customers so they might buy in future.										
0. Demonstrates an effective use of time in completing job assignment.										
BASIC JOB SKILLS										
1. Follows the store's rules and regulations.										
2. Learned the responsibilities of sales position.										

BASIC JOB SKILLS (con't)	IMPORTANCE						TRAINING SEQUENCE				
	Very Important	Important	Undecided	Somewhat Important	Not Important		Entry Level	Intermediate Level	Advanced		
3. Demonstrates effective work habits in both quantity and quality of work.											
4. Dresses in appropriate manner for the job.											
5. Demonstrates the ability to perform needed mathematical computations.											
6. Ability to assist customer in completing a credit application.											
7. Demonstrates the ability to effectively use a cash register.											
8. Demonstrates ability to make change.											
9. Demonstrates ability to handle cash and credit sales transactions.											
10. Ability to write a sales ticket.											
11. Demonstrates ability to handle layaway, exchange, or refunds.											
12. Performs tasks in addition to the sales functions when necessary.											
13. Performs basic housekeeping and stockkeeping duties.											
14. Demonstrates ability to perform clerical and sales-supporting duties after sale is closed.											
15. Demonstrates effective personal hygiene.											
16. Demonstrates effective use of time.											

	IMPORTANCE						TRAINING SEQUENCE				
	Very Important	Important	Undecided	Somewhat Important	Not Important		Entry Level	Intermediate Level	Advanced	
COMMUNICATIONS											
1. Listens to and follows directions, assignments, and information from customers and managers.											
2. Effectively communicates with customers, employees, and managers.											
3. Demonstrates ability to use the telephone correctly.											
4. Ability to explain store policies to customers.											
5. Ability to answer customer inquiries concerning merchandise.											
6. Answer customer inquiries concerning service of the store.											
7. Answer customer request for merchandise on display.											
8. Explain employee problems to management.											
9. Ability to submit suggestions to management.											
0. Answer customer questions concerning grades and standards.											
SALES ATTITUDES											
1. Displays attitude of giving the customer the best service and treatment possible.											
2. Shows a sincere interest in customers and their problems.											
3. Follows store policies when dealing with customers.											

SALES ATTITUDES (con't)	IMPORTANCE						TRAINING SEQUENCE				
	Very Important	Important	Undecided	Somewhat Important	Not Important		Entry Level	Intermediate Level	Advanced		
4. Tries to sell the customer on merchandise benefits; not on the merchandise itself.											
5. Demonstrates an interest in improving his/her selling skill by hard work, study, and attending training sessions or classes.											
SALES SKILLS											
1. Use an appropriate customer approach.											
2. Informs customer about the uses of the product.											
3. Informs customer of services provided by the store.											
4. Asks questions to determine customer needs and buying motives.											
5. Listens and analyzes customer reactions in order to develop the sales presentation to meet needs of customer.											
6. Demonstrates merchandise and involves customer to create interest and desire.											
7. Uses merchandise information in the sales presentation.											
8. Translates product features into buyer benefits to match needs of the customer.											
9. Overcomes customer objections to purchasing the merchandise.											
10. Answers customer questions concerning advertised merchandise.											
11. Demonstrates merchandise as it may be used by customers.											

SALES SKILLS (con't)	IMPORTANCE						TRAINING SEQUENCE			
	Very Important	Important	Undecided	Somewhat Important	Not Important		Entry Level	Intermediate Level	Advanced	
12. Fits or provides customer with the correct merchandise size.										
13. Explains merchandise guarantees and directions to customers.										
14. Uses effective suggestion selling techniques.										
15. Uses trial closing techniques at appropriate time.										
16. Reassures customer that purchase was a wise buying decision.										
17. Ability to wrap purchases.										
18. Ability to remember customer names.										
19. Ability to inform customer of location of advertised merchandise within the store.										
20. Ability to meet sales quotas.										
21. Ability to complete telephone and mail orders.										
22. Suggest merchandise which can be substituted for formerly used merchandise.										
MERCHANDISE										
1. Ability to receive, check, and mark merchandise against an invoice.										
2. Ability to stock shelves, racks, and displays.										

	IMPORTANCE						TRAINING SEQUENCE			
MERCHANDISING (con't)	Very Important	Important	Undecided	Somewhat Important	Not Important		Entry Level	Intermediate Level	Advanced	
3. Ability to rotate and replenish merchandise.										
4. Ability to take accurate stock count for ordering and inventory.										
5. Ability to use company merchandise order forms.										
6. Ability to use price-marking machine to change prices up or down.										
7. Ability to prepare merchandise returns and transfers.										
8. Ability to compute mark-up or mark-down.										
9. Ability to package merchandise for mailing.										
10. Ability to keep stock in order. (sales floor and stock area.)										
11. Study merchandise information found on tags, labels, leaflets, etc.										
OPERATIONS										
1. Ability to use store equipment.										
2. Ability to deal with shoplifters according to store policy.										
3. Ability to handle customer complaints according to store policy.										
4. Ability to complete credit application with the customer.										

DISPLAY	IMPORTANCE						TRAINING SEQUENCE			
	Very Important	Important	Undecided	Somewhat Important	Not Important		Entry Level	Intermediate Level	Advanced	
1. Ability to rearrange and replace merchandise from displays.										
2. Coordinate displays with advertised features.										
3. Ability to build window displays.										
4. Ability to build counter displays.										
5. Ability to build mass displays.										
6. Ability to dress mannequins for displays.										
7. Ability to dismantle displays.										
8. Ability to clean and straighten displays.										